APPENDIX A

Document Name (Navigator Item)	Type	Description	Stage	Step
SEPG Project Plan	Template	The SEPG Project Plan serves as a guideline for defining, measuring, and monitoring commitment to quality by all team members on a project. It also identifies the key project roles, responsibilities, and personnel, and houses the project organization chart.	Process	Plan SEPG Project Execution
			Process	Organize SEPG Project Resources
			Process	Control SEPG Project Work
Decision Analysis and Resolution Reference Document	Reference Document	The Decision Analysis and Resolution (DAR) reference document defines DAR and its value, explains the purpose of DAR, identifies typical decisions requiring DAR, describes DAR techniques and artifacts, and provides guidelines for selecting the appropriate DAR technique. It also specifically outlines the process that all projects must follow when performing DAR. In addition, the DAR reference document informs project teams of the various resources available for resolving and analyzing project decisions during all phases of an organization's application lifecycle. Included are sample artifacts that may be created when using DAR.	Process	Plan SEPG Project Execution
SEPG Work Plan	Template	The SEPG Work Plan describes the key deliverables to be produced, the activities to be performed, the estimated effort required, key completion dates. They are produced at the project planning time: either at the end of a preceding phase of work, or during the project definition process. This will be the basis for the project's approach and staffing requirements.	Process	Plan SEPG Project Execution
			Process	Control SEPG Project Work

Communication and Sponsorship Toolkit	Reference Document	The Communication and Sponsorship Plan Toolkit documents the instructions and areas of consideration for the Communication and Sponsorship Plan. The Communication and Sponsorship Plan serves as a guide to the communication and sponsorship efforts throughout the duration of the project.	Process	Plan SEPG Project Execution
Communication and Sponsorship Plan	Template and Sample	The Communication and Sponsorship Plan serves as a guide to the communication and sponsorship efforts throughout the duration of the project. It is a living and working document and should be updated periodically as audience needs change.	Process	Plan SEPG Project Execution
			Process	Control SEPG Project Work
Configuration Management Plan	Template	The Configuration Management Plan applies to all information systems and related system engineering activities that might affect the achievement of a project's effort. This would include hardware, software, and documentation. In particular, the focus of this plan is on the enterprise perspective of configuration management. This plan identifies the need for a configuration management function that will maintain focus on the overall technical and functional objectives of the program. This enterprise configuration management function will also provide the continuous guidance needed to support the delivery of targeted business capabilities. Implementing a configuration management structure will provide senior management with oversight ability.	Process	Plan SEPG Project Execution
			Process	Control SEPG Project Work
Risk Management Plan	Template	The purpose of Risk Management Planning is to focus attention on minimizing threats in the achievement of project objectives. It will provide a systematic approach for identifying and assessing risks, determining cost-effective risk reductions, and monitoring and reporting progress in reducing risk. All projects must perform risk planning in order to achieve Risk Management Planning objectives. Large projects should create a formal Risk Management Plan, but smaller projects need only to incorporate their risk planning into the Project Plan.	Process	Plan SEPG Project Execution
			Process	Control SEPG Project Work

Training Needs Matrix	Template	The Training Needs Matrix lists the required training by role on a project, and describes the format of each training. It is used as a guide in identifying training needs, and as a tracking mechanism to ensure that project team members receive the necessary training required to fulfill their roles.	Process	Plan Project Execution
			Process	Organize Project Resources
			Process	Control SEPG Project Work
Orientation Binder	Template	The Orientation Binder acts as a key source of information for a new team member. The topics and information provided within the binder will help the new member get acquainted with the project's purpose, administrative processes and programs. Projects are required to create physical binders to hold the information outlined in the orientation binder template and must update the Orientation Binder with applicable project information.	Process	Organize SEPG Project Resources
SEPG Processes & Policies Table of Contents	Template	The SEPG Project Processes & Policies Table of Contents documents the project's formalized policies, standards, and processes. It also indicates the policies, standards, and processes that the project is required to develop.	Process	Organize SEPG Project Resources
Project Processes & Policies	Template	This Project Processes & Policies document is used to record standards and procedures that are specific to a project. Such documents would include the Issue Tracking Process, Risk Tracking Process, New Process Definition Process, all development and testing procedures, etc. See attached samples as a starting point for developing project-specific processes.	Process	Organize SEPG Project Resources
Training Needs Matrix (shaded for update)	Template	See first occurrence of Navigator Item.	See first occurrence of Navigator Item.	See first occurrence of Navigator Item.
CMMI Awareness Training	Training	The CMMI Awareness Training is a presentation designed to help training attendees understand the CMMI framework and its benefits, understand CMMI Level 2 concepts and examples, and understand CMMI Level 3 concepts and examples. This Training pertains to the Capability Maturity Model - Integrated (CMMI) framework. CMM in a Box is based on the CMMI framework.	Process	Organize SEPG Project Resources

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CMMI Awareness for Sponsors Training	Training	The CMMI Awareness for Sponsors Training is a presentation designed to help sponsors understand the CMMI framework and its benefits, understand CMMI Level 2 concepts and examples, and understand CMMI Level 3 concepts and examples.	Process	Organize SEPG Project Resources
SEPG Overview Training	Training	The SEPG Program Overview is a brief presentation designed to help the training attendees understand CMMI and why it is important to the organization as well as understand how the SEPG supports the CMMI.	Process	Organize SEPG Project Resources
Quality Reviews Training	Training	The Quality Reviews Training provides attendees with a definition and purpose for the Software Quality Assurance and Peer Reviews. The training will help to better understand the importance of Quality Reviews, the process to carry out each Quality Review, and understand the roles and responsibilities for each Quality Review. Contact Resources are included to provide more information for attendees.	Process	Organize SEPG Project Resources
Metrics Training	Training	The Metrics Training will help projects to implement metrics.	Process	Organize SEPG Project Resources
Document Repository Overview	Reference Document	The Document Repository Overview defines a document repository, outlines its purpose, and provides guidance in choosing a document repository for your project/organization. The Document Repository Overview should be utilized when selecting a document repository.	Process	Organize SEPG Project Resources
Issues	Tool	Issue Management is the process of recording, tracking and resolving issues that are impacting the project. Issues are generally problems that involve a significant choice between two or more alternatives for an event that is happening now. Projects should track at minimum the nature of the issue, the impact, priority, status and resolution.	All Stages	All Task Packages

Risks	Tool	Risk Management is the process of recording, tracking, and mitigating risks that may result in issues that affect the project. Risks are situations that could occur and if they do, they would have a significant impact on the project. Projects should track at minimum the nature of the risk, the impact, mitigation approach and final outcome.	All Stages	All Task Packages
SIRs/CRs	Tool	Incident Management is the process of recording, tracking and resolving incidents that impact the project. Incidents include system investigation requests (SIRs) and change requests (CRs). Projects should track at minimum the nature of the incident, the impact, priority, status and resolution.	All Stages	All Task Packages
Agenda/Minutes	Template	The Meeting Minutes/Agenda documents the purpose and content of a meeting, as well as any key meeting outcomes and action items.	Process	Control SEPG Project Work
Individual and/or Team Status Reports	Template	Individual and/or Team Status Reports contain status information from each team member, or for the entire team. This will list accomplishments for the week, tasks for next week, issues, and other information that may be appropriate for status communication.	Process	Control SEPG Project Work
Project Status Reports	Template	The Project Status Report summarizes project status and reports on project metrics, key milestones, effort, issues and risks.	Process	Control SEPG Project Work
Configuration Management Status Report	Template	The Configuration Management Status Report presents a high-level status of CM activities to project management. The Configuration Management status must be reported to project management on a periodic basis as established in the Configuration Management Plan.	Process	Control SEPG Project Work

SEPG Project Plan (shaded for update)	Template	See first occurrence of Navigator Item at the Process Plan and Organize SEPG Stage.	See first occurrence of Navigator Item at the Process Plan and Organize SEPG Stage.	See first occurrence of Navigator Item at the Process Plan and Organize SEPG Stage.
SEPG Work Plan (shaded for update)	Template	See first occurrence of Navigator Item at the Process Plan and Organize SEPG Stage.	See first occurrence of Navigator Item at the Process Plan and Organize SEPG Stage.	See first occurrence of Navigator Item at the Process Plan and Organize SEPG Stage.
Communication and Sponsorship Plan (shaded for update)	Template	See first occurrence of Navigator Item at the Process Plan and Organize SEPG Stage.	See first occurrence of Navigator Item at the Process Plan and Organize SEPG Stage.	See first occurrence of Navigator Item at the Process Plan and Organize SEPG Stage.

Risk Management Plan (shaded for update)	Template	See first occurrence of Navigator Item at the Process Plan and Organize SEPG Stage.	See first occurrence of Navigator Item at the Process Plan and Organize SEPG Stage.	See first occurrence of Navigator Item at the Process Plan and Organize SEPG Stage.
Configuration Management Plan (shaded for update)	Template	See first occurrence of Navigator Item at the Process Plan and Organize SEPG Stage.	See first occurrence of Navigator Item at the Process Plan and Organize SEPG Stage.	See first occurrence of Navigator Item at the Process Plan and Organize SEPG Stage.
Training Needs Matrix (shaded for update)	Template	See first occurrence of Document at the Process Plan and Organize SEPG Stage.	See first occurrence of Navigator Item at the Process Plan and Organize SEPG Stage.	See first occurrence of Navigator Item at the Process Plan and Organize SEPG Stage.

Service Level Agreement	Reference Document	The purpose of this Service Level Agreement is to define the service level and communication requirements between a project and the Software Engineering Process Group (SEPG). This document is presented to the project manager who must agree to and sign before a substantive SEPG support commences. The SEPG will distribute a copy of the Service Level Agreement to the Engagement Partner, while it is the responsibility of the Project Manager to distribute/educate project team members on the contents. The Service Level Agreement provides an overview of estimated time commitments to support execution of SEPG efforts.	Process	Rollout & Support Projects
Tailoring & Waiver Request	Reference Document	The Tailoring & Waiver Request template provides guidance on how a project can tailor the methodology to better suit their needs. It includes guidelines on policy, process, deliverable, and tool tailoring. After reviewing the guidelines, if your project determines that a waiver request form is required, please complete the waiver request form using the "Compose Deliverable" option above.	Process	Rollout & Support Projects
Metrics Workbook	Reference Document	The Project Metrics Workbook template is used as a central repository for the metrics required by the Project Team. The project must complete the Metrics Workbook on a monthly basis and submit it to the SEPG team lead. The Metrics Plan outlines the overall metrics program and provides detailed explanations for each metric included in the Metrics Workbook.	Process	Rollout & Support Projects
Metrics Plan	Reference Document	The Metrics Plan describes the overall approach for identifying, collecting, and analyzing delivery metrics. Projects must use this document to plan for their metrics.	Process	Rollout & Support Projects
Project Management Review Tool	Template	The purpose of the document is to provide information on how to demonstrate each best practice by KPA (Key Process Area). It includes references to templates, job aids and samples deliverables.	Process	Rollout & Support Projects
			Project Management	Plan Project Execution

Closing Memo	Reference Document	This memo is used to communicate and summarize the project. This memo should include project results, pertinent project metrics including schedule and budget plan versus actual, project successes, and project shortcomings.	Process	Rollout & Support Projects
SQA Debrief	Reference Document	The Software Quality Assurance (SQA) Debrief is conducted at the end of the project. During this meeting, the Software Engineering Process Group (SEPG) project manager gathers metrics on the effectiveness of the SQA process for the project and discusses "lessons learned" with project management executives. The results of the SQA Debrief are used to continuously improve the SQA process, methodology and tools.	Process	Rollout & Support Projects
Super SQA Training	Training	The Super SQA Reviewer Training is a presentation designed to help the SQA Reviewer trainee understand and articulate the Super SQA Process, understand the roles and responsibilities involved in a Super SQA Review, and be able to participate in a Super SQA Review.	Process	Conduct Super SQA Review
SQA Report	Template	The Software Quality Assurance (SQA) Report lists deviations in standard processes and deliverables as listed on the CMM Best Practices matrix. The SQA Reviewer produces this document as a result of the SQA review.	Process	Conduct Super SQA Review
Maturity Questionnaire	Sample	The Software Maturity Questionnaire is a detailed questionnaire to identify respondents, their background information, and to assess the project's maturity level based on responses to questions pertaining to key process areas within the maturity level.	Process	Conduct Assessment

Schedule	Sample	This document can be used as a template to create the Assessment Schedule for the period that the assessors are on the project site, the on-site period (OSP), usually last 5 – 10 days. Prior to the assessment, a series of training, interviews, documentation review, and consolidation sessions will need to be conducted so that the assessment team can map the existing management and development processes back to the Capability Maturity Model – Integrated (CMMI). This schedule sample outlines a generic OSP agenda.	Process	Conduct Assessment
Logistics	Sample	The Logistics Sample document can be modified to create a logistics checklist for the organization's assessment. It includes room booking, acquiring necessary equipment, catering, accommodations, and building access information.	Process	Conduct Assessment
Participant List	Sample	This sample participant list can be used as a guide in developing a participant list for the organization's assessment.	Process	Conduct Assessment
Assessment Preparation Training	Sample	The Assessment Preparation Training Sample provides an outline that includes the Assessment Purpose & Overview, Roles & Responsibilities, Interviews Do's & Don'ts, Process Assets, Interview Questions, Schedule Logistics, and Questions.	Process	Conduct Assessment
Participant Information Sample	Sample	The purpose of the Participant Information Sheet is to set expectations of the assessment participants as they prepare for the assessment process.	Process	Conduct Assessment
Mini-Appraisal Plan	Template	The purpose of this plan is to outline the of a mini-appraisal process for the organization. This plan documents the goals, objectives, expected outcomes, scope, participants, schedule, and logistics of the evaluation. It also specifies the tailoring of the Standard CMMI Assessment Method for Process Improvement method for the purposes of the mini-appraisal.	Process	Conduct Assessment

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Process Improvement Survey	Reference Document	The Process Improvement Survey should be distributed to all participants to gather information regarding their experience with the Software Engineering Process Group (SEPG). The information gathered from this survey should be used as an input in improving the processes of the Software Process Engineering Group.	Process	Conduct Quarterly Survey
Organizational Design & Development Toolkit	Reference Document	The purpose of the Organization Design and Development (OD&D)Toolkit is to help create, modify, and/or develop organization structures to meet internal and external needs. Depending on the scope of the organization design and development initiative, some or all of the information can be used to facilitate the initiative. The steps within the toolkit provide guidance in planning, designing, and implementing organization design changes. This toolkit includes detailed information for each step of organization design and development. The appendices to the OD&D Toolkit contain sample deliverables and/or templates for many of the steps. Use the templates/samples as a starting point for your own documents.	Personnel	Identify Organization Strategy
			Personnel	Conduct Organization Assessment
			Personnel	Design Organization Infrastructure
			Personnel	Verify and Validate Organization Structure
			Personnel	Design Performance Management Infrastructure
			Personnel	Determine Organization Infrastructure Mobilization Approach
Core Competencies	Template	The Core Competencies document lists sample core competencies that will be developed as part of the Organization Design and Development process. A competency is a cluster of related knowledge, skills, and other attributes/abilities associated with high performance on a job. Below is a list of sample competencies. For more information about competencies, see the Organization Design and Development Toolkit.	Personnel	Determine Organization Infrastructure Mobilization Approach

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Guiding Principles	Template	The Guiding Principles should be produced through discussions with members of the organization to reflect the current operation model, organizational values and norms, and business strategies. These guiding principles should be used as guidelines. Think of them as tips on how to ensure that the organization infrastructure design is consistent with the intent of the organization strategy. The guiding principles can be a general list or broken into broad categories.	Personnel	Determine Organization Infrastructure Mobilization Approach
Organizational Design & Development Toolkit	Reference Document	See first occurrence of Navigator Item in Identify Organization Strategy.	See first occurrence of Navigator Item in Identify Organization Strategy.	See first occurrence of Navigator Item in Identify Organization Strategy.
Gap Analysis	Template	The Gap Analysis worksheet is a table used to capture the gap between the current assessment and the desired organization.	Personnel	Conduct Organization Assessment
Organizational Design & Development Toolkit	Reference Document	See first occurrence of Navigator Item in Identify Organization Strategy.	See first occurrence of Navigator Item in Identify Organization Strategy.	See first occurrence of Navigator Item in Identify Organization Strategy.

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Competency Model	Template	The Competency Model begins with the Competency Model Name module with the name of the Team Lead. The next module, Team Lead Competency Model, contains a table that illustrates the competencies associated with the "team lead" career field, the competency definitions, and the required proficiency levels for all competencies. The last module, Proficiency Scale, contains a table that illustrates the proficiency level and corresponding behavioral indicators for the problem-solving competency.	Personnel	Design Organization Infrastructure
Role Description	Template	The purpose of this document is to aid in the process of role design that consists of arranging tasks that make up a role in order to maximize the contribution the role makes to the business processes and the agency. Role descriptions should be written concurrently with the design of the competency model. More information about role design can be found in the Organization Design and Development Toolkit.	Personnel	Design Organization Infrastructure
Preliminary Job Description	Template	A job is a group of related roles that defines an individual's place within the organization. The organization design initiative is only tasked with creating the preliminary job description. The final job description will be developed by the offices after implementation based on the level of the employees assigned to each position. Job descriptions should be written concurrently with the design of the competency model. More information about role design can be found in the Organization Design and Development Toolkit.	Personnel	Design Organization Infrastructure

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Sample Organization Structures	Sample	This sample document outlines the different Organizational Structure Types and provides samples of each. These include Functional, Process, Product, Matrix, and Customer/Industry-focused.	Personnel	Design Organization Infrastructure
Organizational Design & Development Toolkit	Reference Document	See first occurrence of Navigator Item in Identify Organization Strategy.	See first occurrence of Navigator Item in Identify Organization Strategy.	See first occurrence of Navigator Item in Identify Organization Strategy.
Competency Model (shaded for update)	Template	See first occurrence of Navigator Item in Design Organization Infrastructure.	See first occurrence of Navigator Item in Design Organization Infrastructure.	See first occurrence of Navigator Item in Design Organization Infrastructure.
Role Description (shaded for update)	Template	See first occurrence of Navigator Item in Design Organization Infrastructure.	See first occurrence of Navigator Item in Design Organization Infrastructure.	See first occurrence of Navigator Item in Design Organization Infrastructure.
Preliminary Job Description (shaded for update)	Template	See first occurrence of Navigator Item in Design Organization Infrastructure.	See first occurrence of Navigator Item in Design Organization Infrastructure.	See first occurrence of Navigator Item in Design Organization Infrastructure.
Organizational Design & Development Toolkit	Reference Document	See first occurrence of Navigator Item in Identify Organization Strategy.	See first occurrence of Navigator Item in Identify Organization Strategy.	See first occurrence of Navigator Item in Identify Organization Strategy.

Performance Measurement Toolkit	Toolkit	The purpose of the Performance Measurement (PM) Toolkit is to assist the organization in formulating a performance measurement process to develop goals, measures, and targets of performance that link to the strategic vision, mission, and overall business objectives of the organization. The Performance Measurement Toolkit does not apply to individual measurement. Please refer to the Organization Design and Development Toolkit for more information on individual performance measurement tools and processes.	Personnel	Design Performance Management Infrastructure
Organizational Design & Development Toolkit	Reference Document	See first occurrence of Navigator Item in Identify Organization Strategy.	See first occurrence of Navigator Item in Identify Organization Strategy.	See first occurrence of Navigator Item in Identify Organization Strategy.
Training Toolkit	Reference Document	The Training Toolkit will help plan and deliver training to the audience(s) who will use newly identified processes. This will help people to perform their roles effectively and efficiently. The training task for each new initiative is a critical component of preparing employees for change. The Training Toolkit is intended to provide guidance on developing training to "get people started" and to explain "what's new and different"—NOT for developing ongoing training. It is not intended to provide guidance on creating continuing training programs in the organization, even if a need for such training is identified. This toolkit can be used to create short-term, one-time training on the newly defined process(es).	Personnel	Conduct Training Needs Analysis
			Personnel	Develop Training Plan
			Personnel	Design Training
			Personnel	Develop Training
			Personnel	Deliver Training
			Personnel	Provide Post-Implementation Support
Training Needs Analysis	Template	The Training Needs Analysis course is used to prepare instructors for the needs of affected training audiences. It includes a high level training needs analysis by audience or group and a more detailed analysis for individuals.	Personnel	Conduct Training Needs Analysis

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Training Toolkit	Template	See first occurrence of Navigator Item in Conduct Training Needs Analysis.	See first occurrence of Navigator Item in Conduct Training Needs Analysis.	See first occurrence of Navigator Item in Conduct Training Needs Analysis.
Training Plan	Template	The Training Plan course is used to prepare instructors how to teach a particular course. It includes training approach, course curriculum, and module descriptions.	Personnel	Develop Training Plan
Training Toolkit	Template	See first occurrence of Navigator Item in Conduct Training Needs Analysis.	See first occurrence of Navigator Item in Conduct Training Needs Analysis.	See first occurrence of Navigator Item in Conduct Training Needs Analysis.
Training Development Standards	Template	The purpose of the Training Development Standards is to ensure that training materials are created with consistent instructional design and development principles and techniques. This consistent "look and feel" promotes effective learning for training participants.	Personnel	Design Training
Instructor Guide	Template	The Instructor Guide is used to prepare instructors to teach a particular course. It includes a course overview containing objectives, prerequisites, and topic timing. The template is organized in modules that walk the instructor through entire course agenda along with instructor notes.	Personnel	Design Training
Participant Guide	Template	The Participant Guide is used to provide participants with the agenda and presentation information for the course without the instructor notes.	Personnel	Design Training
Training Toolkit	Template	See first occurrence of Navigator Item in Conduct Training Needs Analysis.	See first occurrence of Navigator Item in Conduct Training Needs Analysis.	See first occurrence of Navigator Item in Conduct Training Needs Analysis.

Train-the-Trainer Course Description	Template	The Train-the-Trainer course is used to prepare instructors to teach a particular course. The Course Description defines the objectives, pre-requisites, expectations, length, and agenda for the training course.	Personnel	Develop Training
Training Development Standards (shaded for update)	Template	See first occurrence of Navigator Item in Design Training.	See first occurrence of Navigator Item in Design Training.	See first occurrence of Navigator Item in Design Training.
Instructor Guide (shaded for update)	Template	See first occurrence of Navigator Item in Design Training.	See first occurrence of Navigator Item in Design Training.	See first occurrence of Navigator Item in Design Training.
Participant Guide (shaded for update)	Template	See first occurrence of Navigator Item in Design Training.	See first occurrence of Navigator Item in Design Training.	See first occurrence of Navigator Item in Design Training.
Sign In Sheet	Template	The Sign-In Sheet document can be used to record training attendee information. This document should be used in conjunction with the Develop Training section of the Training Toolkit. Reference the Develop Training section of the Training Toolkit for additional background information regarding the Sign-In Sheet.	Personnel	Develop Training
Course Evaluation	Template	The Course Evaluation document should be used by training attendees who are expected to complete this evaluation at the end of each training session. This document should be used in conjunction with the Develop Training section of the Training Toolkit. Reference the Develop Training section of the Training Toolkit for additional background information regarding the Course Evaluation.	Personnel	Develop Training
Training Toolkit	Template	See first occurrence of Navigator Item in Conduct Training Needs Analysis.	See first occurrence of Navigator Item in Conduct Training Needs Analysis.	See first occurrence of Navigator Item in Conduct Training Needs Analysis.

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Training Toolkit	Template	See first occurrence of Navigator Item in Conduct Training Needs Analysis.	See first occurrence of Navigator Item in Conduct Training Needs Analysis.	See first occurrence of Navigator Item in Conduct Training Needs Analysis.
Program Business Case Approach	Reference	The objective of the Program Business Case Approach is to define the process for identifying, estimating, documenting, and submitting project initiatives for the upcoming year. First, it defines the process by which the next year's projects are identified. Second, it defines a process to ensure that all costs and benefits associated with the implementation of projects are estimated in a consistent manner. Third, it defines a process to ensure that all business cases are documented and in a consistent manner that allows ease of comparison across projects. And last, it defines the processes for reviewing and submitting the business cases. This process is applicable to all programs and subordinate projects.	Program Management	Justify Program
Program Business Case	Template and Sample	The Program Business Case is to be used in conjunction with the Program Business Case Approach and the Program Business Case Sample. This document is to be used as a template for building a business case while the Program Business Case Sample document provides an example of what the actual Business Case should look like. This document should be used if the organization does not have an existing and well-defined Business Case. In cases where a Business Case already exists, use the existing document.	Program Management / Program Management	Justify Program / Control Program Work

Program Management Approach	Reference Document	The Program Management Approach reference document describes the various organizational approaches that can be used when operating the program office. This document also identifies the key processes, initiation and start-up activities, deliverables, and general responsibilities of a program office. This document should be used for guidance when developing the Program Plan.	Program Management	Plan Program Execution
			Program Management	Organize Program Resources
			Program Management	Control Program Work
			Program Management	Complete Program
Program Plan	Template	The Program Plan defines the overall management approach and processes for running the program. Written during the planning phase, this document serves as a roadmap for running the program. It includes all major management functions such as program organization, quality, metrics, and reporting.	Program Management	Plan Program Execution
			Program Management	Organize Program Resources
			Program Management	Control Program Work
Program Performance Reporting Approach	Reference	Performance Reporting involves the assessment and documentation of the overall program and each project's performance and progress against the plan. Project status reporting and team member time reporting are critical functions within this process. The purpose of this deliverable is to develop the Performance Reporting process and to record any future changes in direction, scope, or timeframes.	Program Management	Plan Program Execution
Program Financial Management Plan	Template	This document defines the financial controls and processes for the program, including financial management and reporting.	Program Management	Plan Program Execution

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Program Resource Management Plan	Template	The Program Resource Management Plan defines the method for sourcing and managing the program's human and physical resources. The objectives include obtaining, preparing, managing, and releasing human and physical resources required by the individual project teams on the program, as well as to provide assistance in other human resource concerns.	Program Management	Plan Program Execution
			Program Management	Organize Program Resources
			Program Management	Control Program Work
Program Release Management Approach	Reference	The Program Release Management Approach is a set of guidelines that cover the management approach for defining, planning and delivering releases. Release management is responsible for defining and managing the individual releases as well as the dependencies and interfaces between releases. Although the techniques described in these guidelines are particularly applicable to large, long-term programs of change covering multiple releases, with appropriate scaling they can also be applied to more limited-scope programs or projects. It is important to note that these guidelines specify a generic release management approach. The actual release strategy and the definition of the releases themselves for a given program are contained in the Release Plan, which is a separate, program-specific document.	Program Management	Plan Program Execution
Program Management Approach	Reference	See first occurrence of Navigation Item.	See first occurrence of Navigation Item.	See first occurrence of Navigation Item.
Program Resource Management Plan (shaded for update)	Template	See first occurrence of Navigation Item.	See first occurrence of Navigation Item.	See first occurrence of Navigation Item.

Program Resource Request	Template	The purpose of the Program Resource Request is to outline the process by which to request resources for a program. This includes request specifications, role and responsibilities requirements, resource preparation, and request approval. When completing the Performance Resource Request, the Program Manager should review the Program Management Approach for input into the request process.	Program Management	Organize Program Resources
Program Plan (shaded for update)	Template	See first occurrence of Navigation Item.	See first occurrence of Navigation Item.	See first occurrence of Navigation Item.
Program Management Approach	Reference	See first occurrence of Navigation Item.	See first occurrence of Navigation Item.	See first occurrence of Navigation Item.
Program Resource Management Plan (shaded for update)	Template	See first occurrence of Navigation Item.	See first occurrence of Navigation Item.	See first occurrence of Navigation Item.
Program Business Case (shaded for update)	Template	See first occurrence of Navigation Item.	See first occurrence of Navigation Item.	See first occurrence of Navigation Item.
Program Plan (shaded for update)	Template	See first occurrence of Navigation Item.	See first occurrence of Navigation Item.	See first occurrence of Navigation Item.
Program Management Approach	Reference	See first occurrence of Navigation Item.	See first occurrence of Navigation Item.	See first occurrence of Navigation Item.
Program Closeout Report	Template	The Program Closeout Report documents the closure of the program. It includes details of the final disposition of all human and physical resources and describes the archived location of all historical program records that are captured.	Program Management	Complete Program

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Service Level Agreement	Template	The purpose of this Service Level Agreement is to define the service level and communication requirements between a project and the Software Engineering Process Group (SEPG). This document is presented to the project manager who must agree to and sign before a substantive SEPG support commences. The SEPG will distribute a copy of the Service Level Agreement to the Engagement Partner, while it is the responsibility of the Project Manager to distribute/educate project team members on the contents. The Service Level Agreement provides an overview of estimated time commitments to support execution of SEPG efforts.	Project Management	Plan Project Execution
Best Practices Matrix	Reference Document	The purpose of the document is to provide information on how to demonstrate each best practice by KPA (Key Process Area). It includes references to templates, job aids and samples deliverables.	Project Management	Plan Project Execution
Tailoring & Waiver Request	Template	The Waiver Request and Tailoring template provides guidance on how a project can tailor the methodology to better suit their needs. It includes guidelines on policy, process, deliverable, and tool tailoring. After reviewing the guidelines, if your project determines that a waiver request form is required, please complete the waiver request form using the "Compose Deliverable" option above.	Project Management	Plan Project Execution
Metrics Plan	Reference Document	The Metrics Plan describes the overall approach for identifying, collecting, and analyzing delivery metrics. Projects must use this document to plan for their metrics.	Project Management	Plan Project Execution
Project Plan	Template	The Project Plan serves as a guideline for defining, measuring, and monitoring commitment to quality by all team members on a project. It also identifies the key project roles, responsibilities, and personnel, and houses the project organization chart.	Project Management	Plan Project Execution
			Project Management	Organize Project Resources
			Project Management	Control Project Work

Decision Analysis and Resolution	Reference Document	The Decision Analysis and Resolution (DAR) reference document defines DAR and its value, explains the purpose of DAR, identifies typical decisions requiring DAR, describes DAR techniques and artifacts, and provides guidelines for selecting the appropriate DAR technique. It also specifically outlines the process that all projects must follow when performing DAR. In addition, the DAR reference document informs project teams of the various resources available for resolving and analyzing project decisions during all phases of an organization's application lifecycle.	Project Management	Plan Project Execution
Work Plan	Template	The Work Plan describe the key deliverables to be produced, the activities to be performed, the estimated effort required, key completion dates. They are produced at the project planning time: either at the end of a preceding phase of work, or during the project definition process. This will be the basis for the project's approach and staffing requirements.	Project Management	Plan Project Execution
			Project Management	Organize Subcontractor Management Resources
Communication and Sponsorship Toolkit	Reference Document	The Communication and Sponsorship Plan serves as a guide to the communication and sponsorship efforts throughout the duration of the project. It is a living and working document and should be updated periodically as audience needs change. The Communication and Sponsorship Plan Toolkit documents the instructions and areas of consideration for the Communication and Sponsorship Plan.	Project Management	Plan Project Execution
Communication and Sponsorship Plan	Template and Sample	The Communication and Sponsorship Plan serves as a guide to the communication and sponsorship efforts throughout the duration of the project. It is a living and working document and should be updated periodically as audience needs change.	Project Management	Plan Project Execution

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Estimating Worksheet	Sample	The estimating process applies the cost factors against the tailored work plan to produce an estimate of the effort that will be required for a project. The project's overall complexity can also inflate or deflate the project's estimate. This process involves determining the project's complexity, determining the factor values, and applying these values to determine the final estimated project costs in dollars and days. Upon completing a project, the estimating worksheet sheet should be updated based on the actuals that were tracked. This will allow future estimates to be more accurate.	Project Management	Plan Project Execution
Configuration Management Plan	Template	The Configuration Management Plan applies to all information systems and related system engineering activities that might affect the achievement of a project's effort. This would include hardware, software (COTS and/or custom), and documentation. In particular, the focus of this plan is on the enterprise perspective of configuration management. This plan identifies the need for a configuration management function that will maintain focus on the overall technical and functional objectives of the program. This enterprise configuration management function will also provide the continuous guidance needed to support the delivery of targeted business capabilities. Implementing a configuration management structure will provide senior management with oversight ability.	Project Management	Plan Project Execution
Risk Management Plan	Template	The purpose of Risk Management Planning is to focus attention on minimizing threats in the achievement of project objectives. It will provide a systematic approach for identifying and assessing risks, determining cost-effective risk reductions, and monitoring and reporting progress in reducing risk. All projects must perform risk planning in order to achieve Risk Management Planning objectives. Large projects should create a formal Risk Management Plan, but smaller projects need only to incorporate their risk planning into the Project Plan.	Project Management	Plan Project Execution

Training Needs Matrix	Template	The training needs matrix lists the required training by role on a project, and describes the format of each training. It is used as a guide in identifying training needs, and as a tracking mechanism to ensure that project team members receive the necessary training required to fulfill their roles.	Project Management	Plan Project Execution
			Project Management	Organize Project Resources
			Project Management	Control Project Work
Metrics Workbook	Template	The Project Metrics Workbook template is used as a central repository for the metrics required by the Project Team. The project must complete the Metrics Workbook on a monthly basis and submit it to the SEPG team lead. The Metrics Plan outlines the overall metrics program and provides detailed explanations for each metric included in the Metrics Workbook.	Project Management	Plan Project Execution
			Project Management	Control Project Work
			Project Management	Complete Project
Project Plan (shaded for update)	Template	See first occurrence of Navigator Item.	See first occurrence of Navigator Item.	See first occurrence of Navigator Item.
Project Processes & Policies Table of Contents	Template	The Project Processes & Policies Table of Contents documents the project's formalized policies, standards, and processes. It also indicates the policies, standards, and processes that the project is required to develop.	Project Management	Organize Project Resources
Project Processes & Policies	Template	This document is used to record standards and procedures that are specific to a project. Such documents would include the Issue Tracking Process, Risk Tracking Process, New Process Definition Process, all development and testing procedures, etc. See attached samples as a starting point for developing project-specific processes.	Project Management	Organize Project Resources
Training Needs Matrix (shaded for update)	Template	See first occurrence of Navigator Item.	See first occurrence of Navigator Item.	See first occurrence of Navigator Item.
Issues		Issue Management is the process of recording, tracking and resolving issues that are impacting the project. Issues are generally problems that involve a significant choice between two or more alternatives for an event that is happening now. Projects should track at minimum the nature of the issue, the impact, priority, status and resolution.	All Stages	All Task Packages

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Risks		Risk Management is the process of recording, tracking, and mitigating risks that may result in issues that affect the project. Risks are situations that could occur and if they do, they would have a significant impact on the project. Projects should track at minimum the nature of the risk, the impact, mitigation approach and final outcome.	All Stages	All Task Packages
Agenda/Minutes	Template	The Meeting Minutes/Agenda documents the purpose and content of a meeting, as well as any key meeting outcomes and action items.	Project Management	Control Project Work
Individual and/or Team Status Reports	Template	This contains status information from each team member, or for the entire team. This will list accomplishments for the week, tasks for next week, issues, and other information that may be appropriate for status communication.	Project Management	Control Project Work
Project Status Reports	Template	The Project Status Report summarizes project status and reports on project metrics, key milestones, effort, issues and risks.	Project Management	Control Project Work
Configuration Management Status Report	Template	The Configuration Management Status Report presents a high-level status of CM activities to project management. The CM status must be reported to project management on a periodic basis as established in the CM Plan.	Project Management	Control Project Work
Training Needs Matrix (shaded for update)	Template	See first occurrence of Navigator Item.	See first occurrence of Navigator Item.	See first occurrence of Navigator Item.
Requirements Traceability Matrix (shaded for update)	Template	See first occurrence of Navigator Item at the Analysis Stage.	See first occurrence of Navigator Item at the Analysis Stage.	See first occurrence of Navigator Item at the Analysis Stage.
Configuration Audits	Template	The Configuration Audit Template is used to document the conduct of a configuration audit and record the discrepancies and the corrective actions for those discrepancies. The three main components of the audit template describe the project information, lists the components audited, and lists the findings resulting from the audit. All discrepancies must be resolved or answered prior to establishing a new baseline and before the audit can be called complete. Completing the additional comments and issues to consider during next audit sections will prove beneficial in clarifying the table entries.	Project Management	Control Project Work

Metrics Workbook (Shaded for Update	Template	See first occurrence of Navigator Item.	See first occurrence of Navigator Item.	See first occurrence of Navigator Item.
Project Plan (shaded for update)	Template	See first occurrence of navigator item.	See first occurrence of navigator item.	See first occurrence of navigator item.
Closing Memo	Template	This memo is used to communicate and summarize the project. This memo should include project results, pertinent project metrics including schedule and budget plan versus actual, project successes, and project shortcomings.	Project Management	Complete Project
			Project Management	Complete Subcontractor Management
			Project Management	Complete Product Acquisition
Metrics Workbook (Shaded for Update	Template	See first occurrence of Navigator Item.	See first occurrence of Navigator Item.	See first occurrence of Navigator Item.
SQA Report & Project Response	Template	The Software Quality Assurance (SQA) Report lists deviations in standard processes and deliverables as listed on the CMM Best Practices matrix. The SQA Reviewer produces this document as a result of the SQA review.	Project Management	SQA Review Execution
Business Case	Template	The Business Case provides economic justification for the change journey and for each program within the change journey. The Business Case explains why the sponsoring organization must change, what value it receives by changing, and what steps are necessary for a successful change. The Business Case addresses three main components: (1) business context and change imperatives, (2) value impact analysis, and (3) change journey.	Analysis	Define Business Case
Current Business Assessment	Template	The Current Business Assessment allows for reviewing of the existing system. This makes it possible to identify potential reusable components, required interfaces, and eventually the scope of the required application and its supporting network.	Analysis	Requirements Development & Analysis

Business and User Requirements	Template	The Business and User Requirements document outlines the requirements for design in a structured, top-down manner. The objective is to describe "what needs to be done and/or achieved" and includes general information about the proposed solution, business rules, functions, process flows, and the requirements themselves. This document should map to the application interface requirements and ultimately to the requirements traceability matrix.	Analysis	Requirements Development & Analysis
			Analysis	Assess Deployment Environment
New Business Assessment	Template	The New Business Assessment deliverable identifies the number of users per location that will be using the application. It is required for estimating hardware and software needs.	Analysis	Requirements Development & Analysis
Business and User Requirements (shaded for update)	Template	See first occurrence of Navigator Item.	See first occurrence of Navigator Item.	See first occurrence of Navigator Item.
Peer Review	Template	Moved to Peer Review design matrix.	Moved to Peer Review design matrix.	Moved to Peer Review design matrix.
Plan Delivery	Task Package	Moved to Commit design matrix.	Moved to Commit design matrix.	Moved to Commit design matrix.
Commit	Template	Moved to Commit design matrix.	Moved to Commit design matrix.	Moved to Commit design matrix.
Application and Interface Requirements	Template	The Application and Interface Requirements document describes the application and interface requirements. It is a further breakdown of the business requirements and includes: general overview of the system, operating environment, system interfaces, and references to the requirements traceability matrix.	Analysis	Identify and Analyze Application and Interface Requirements

Requirements Traceability Matrix	Template	The Requirements Traceability Matrix lists requirements from stakeholders that the solution needs to fulfill. Stakeholders can include: users, customers, suppliers, other systems or client representatives. To demonstrate that all requirements are satisfied, the Requirements Traceability Matrix links requirements back to a solution component(s) or document.	Analysis	Identify and Analyze Application and Interface Requirements
			Project Management	Control Project Work
User and Service Level Requirements	Template	The User and Service Level Requirements document describes the users that the solution will support. It also lists the business and transaction volumes that solution must handle as well as required response times.	Design	Analyze Technology Infrastructure Requirements
Execution/Operations Architecture Requirements	Template	The Execution/Operations Architecture is a collection of services and control structures that support the solution. It is an intermediate layer between the application and the operating system software. The Execution/Operations Architecture Requirements deliverable lists the requirements for the execution/operations architecture.	Design	Analyze Technology Infrastructure Requirements
Technology Selection Matrix	Template	The Technology Selection Matrix categorizes requirements for the technology infrastructure, lists options for satisfying each requirement category and lists the recommended solution including the rationale for its selection.	Design	Analyze Technology Infrastructure Requirements

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Development Architecture Requirements	Template	The purpose of the development architecture is to support the tasks involved in the analysis, design, construction, and maintenance of the solution, as well as the associated management processes. The Development Architecture Requirements deliverable lists the requirements for the development architecture.	Design	Analyze Technology Infrastructure Requirements
Technology Infrastructure Scope	Template	The Technology Infrastructure Scope consists of a graphical representation of the scope of the technology infrastructure. It depicts the technology components that make up technology infrastructure and will ultimately support the solution, including links to external systems and peripherals.	Design	Analyze Technology Infrastructure Requirements
Technology Blueprint	Template	The Technology Blueprint provides a high-level view of the technical infrastructure necessary to enable the business objectives. This document should outline the general design for the execution, development and operations environments.	Design	Select and Design Execution/Operations Architecture
			Design	Select and Design Development Architecture
Execution/Operations Architecture Component Design	Template	The Execution/Operations Architecture Component Design deliverable documents the sub-processes and interfaces necessary for a component to meet the specified requirements. The design covers custom components as well as packaged and reuse component extensions for the execution/operations architecture. A document should be created for each development architecture component deliverable.	Design	Select and Design Execution/Operations Architecture

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Execution/Operations Architecture Physical Model	Template	The Execution/Operations Architecture Physical Model shows the actual components comprising the execution/operations architecture and their relative location and interfaces. Interfaces across architectures should also be reflected (e.g., operations architecture interfaces to execution). Moreover, the model will depict the platforms on which the components will reside as well as the distribution across the environment.	Design	Select and Design Execution/Operations Architecture
Execution/Operations Architecture Test Plan	Template	The Execution/Operations Architecture Test Plan documents the specific steps in the testing process. It includes descriptions of the test processes or passes, the cycle definitions, the phase containment criteria, the use of the testing database and configuration management for version control.	Design	Select and Design Execution/Operations Architecture
			Build and Test	Build and Test Execution/Operations Architecture
Execution/Operations Architecture Test Conditions	Template	The Execution/Operations Architecture Test Conditions describe the conditions by which the component will be tested. The conditions map directly to the architecture requirements.	Design	Select and Design Execution/Operations Architecture
			Build and Test	Build and Test Execution/Operations Architecture
Execution/Operations Architecture Test Scripts	Template	The Execution/Operations Architecture Test Scripts define the steps to be followed by the testing executor to test the conditions that have been identified. The scripts are instructions that are clear, unambiguous and repeatable in manner.	Design	Select and Design Execution/Operations Architecture
			Build and Test	Build and Test Execution/Operations Architecture

Execution/Operations Architecture Test Results	Template	The Execution/Operations Architecture Test Results describe the actual results of the test and any issues or lessons learned from the test effort.	Design	Select and Design Execution/Operations Architecture
			Build and Test	Build and Test Execution/Operations Architecture
Execution/Operations Architecture Test Data	Template	The Execution/Operations Architecture Test Data is the data used as input to test the conditions. The data is used in conjunction with the test scripts to validate that the conditions are being met accurately and as required.	Design	Select and Design Execution/Operations Architecture
			Build and Test	Build and Test Execution/Operations Architecture
Technology Blueprint (Shaded for update)	Template	See first occurrence of Navigator Item.	See first occurrence of Navigator Item.	See first occurrence of Navigator Item.
Development Architecture Component Design	Template	The Development Architecture Component Design deliverable documents the sub-processes and interfaces necessary for a component to meet the specified requirements. The design covers custom components as well as packaged and reusable component extensions for the development architecture. A document should be created for each development architecture component deliverable.	Design	Select and Design Development Architecture
Development Architecture Physical Model	Template	The Development Architecture Physical Model shows the actual components comprising the development architecture and their relative location and interfaces. Interfaces across architectures should also be reflected (e.g., operations architecture interfaces with development). Moreover, the model will depict the platforms on which the components will reside as well as the distribution across the environment.	Design	Select and Design Development Architecture

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Overall Testing Approach	Template	This Deliverable documents the various stages involved in testing. A Testing Approach consists of Test Objectives and Scope, Test Overview, Deficiency Tracking Approach, Regression Testing Approach, Test Environment, and Risk Management.	Design	Select and Design Development Architecture
			Design	Plan Testing Approach
Development Architecture Test Plan	Template	The Development Architecture Test Plan documents the specific steps in the testing process. It includes descriptions of the test processes or passes, the cycle definitions, the phase containment criteria, the use of the testing database and configuration management for version control.	Design	Select and Design Development Architecture
			Build and Test	Build and Test Technology Infrastructure
Development Architecture Test Conditions	Template	The Development Architecture Test Conditions describe the conditions by which the component will be tested. The conditions map directly to the architecture requirements.	Design	Select and Design Development Architecture
			Build and Test	Build and Test Technology Infrastructure
Development Architecture Test Scripts	Template	The Development Architecture Test Scripts define the steps to be followed by the testing executor to test the conditions that have been identified. The scripts are instructions that are clear, unambiguous and repeatable in manner.	Design	Select and Design Development Architecture
			Build and Test	Build and Test Technology Infrastructure
Development Architecture Test Results	Template	The Development Architecture Test Results describe the actual results of the test and any issues or lessons learned from the test effort.	Design	Select and Design Development Architecture
			Build and Test	Build and Test Technology Infrastructure

				Select and Design Development Architecture
Development Architecture Test Data	Template	The Development Architecture Test Data is the data used as input to test the conditions. The data is used in conjunction with the test scripts to validate that the conditions are being met accurately and as required.	Design	
			Build and Test	Build and Test Technology Infrastructure
Conceptual Design	Template	The Conceptual Design deliverable, often called the operational concept, describes the key functional and interface requirements for the work product. This document addresses the design method, functional and data requirements, screen design, report design, interfaces, and data conversion at a high level. The details will be expanded later in the general design and detailed design documents.	Design	Design Application Architecture
General Design	Template	The General Design deliverable describes an independently compiled entity, composed of three basic components: formal parameters, local variables, and a complete body of logic. Also known as Programs, Components, or work Units, Modules are packets of grouping all the information necessary to code a portion of an application. It also provides a graphical display of the logical components of a module. Items displayed include Inputs, Outputs, Functional Description, and Interfaces.	Design	Design Application Architecture
Interface Agreement	Template	The Interface Agreement describes the business units or systems associated with an interface and outlines the expectations of the parties developing the various units. This deliverable addresses the handling of change requests, data exchange and control, backup and recovery requirements, error handling procedures, and provides escalation procedures in the event of a conflict.	Design	Design Application Architecture

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Interface Design	Template	The Interface Design Approach is used to outline the process of transferring data in and out of a system. It should include the following features: Interface Execution - The ability to launch interface processes and record information about the processing of those interfaces. File Transfer - A method to transfer the file securely from sending system to receiving system. Error Processing - The process of capturing information about errant data or a process failure in the transfer of data. Restart/ Recovery - The ability to restart an interface that encountered errors during processing. Archiving -The storage of interface files for backup and recovery purposes.	Design	Design Application Architecture
Assembly Test Plan	Template	The Assembly Test Plan documents the specific steps in the testing process. It includes descriptions of the test processes or passes, the cycle definitions, the phase containment criteria, the use of the testing database and configuration management for version control.	Design	Design Application Architecture
			Build & Test	Build and Test Application
Assembly Test Conditions	Template	The Assembly Test Conditions describe the conditions by which the component will be tested. The conditions map directly to the application and interface requirements.	Design	Design Application Architecture
			Build & Test	Build and Test Application
Assembly Test Scripts	Template	The Assembly Test Scripts define the steps to be followed by the testing executor to test the conditions that have been identified. The scripts are instructions that are clear, unambiguous and repeatable in manner.	Design	Design Application Architecture
			Build & Test	Build and Test Application
Assembly Test Results	Template	The Assembly Test Results describe the actual results of the test and any issues or lessons learned from the test effort.	Design	Design Application Architecture
			Build & Test	Build and Test Application

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Assembly Test Data	Template	The Assembly Test Data is the data used as input to test the conditions. The data is used in conjunction with the test scripts to validate that the conditions are being met accurately and as required.	Design	Design Application Architecture
			Build & Test	Build and Test Application
Logical Data Model	Tool	The first iteration of database design for a system. This model includes the entities, keys and relationships as well as a first cut at attributes. This deliverable is typically developed using data modeling tools such as ERWin or Oracle Designer.	Design	Design Database
Data Dictionary	Template	This document supports the logical data model and describes the entities and attributes for the logical data model.	Design	Design Database
Database Configuration	None	Defines the details of the actual database installation configuration including sizes and locations for databases.	Design	Design Database
Database Definition	Template	This document identifies a database, which makes up part of the Physical Database Design. It captures the key aspects of the database, such as the various components: tables, indexes, views, and tablespaces. Optionally, it may include description of the disk configuration, sizings, placement, and segment management strategies. Create this document as an entry point for referencing all the components that belong to this database.	Design	Design Database
Database Space Worksheet	Template	This document describes in detail the assumptions and formulas used to calculate the space requirements for a database. The appropriate formulas for calculating the space requirements are based on the type of database defined. In order to use document database space requirements effectively, a database expert should be consulted to obtain the appropriate formulas.	Design	Design Database

Database to File Mapping	Template	The Database to File System Mapping document defines the sizing estimates for application data as well as for the database components that facilitate rollback and recovery activities. This document is a component of a Physical Database Design. Use this document when designing the physical space considerations for the database. This document should also be used when planning and executing the technical infrastructure product test and the application product test to monitor and optimize system performance.	Design	Design Database
Relational Index Definition	Template	This document defines the physical index that provides an access path onto a relational table. It defines the columns that constitute the access path. For all applications using relational databases, use the Relational Index Definition deliverable to describe the characteristics of an index of the table. This document is typically created by a Technical Analyst or Database Administrator (DBA) or Data Administrator (DA).	Design	Design Database
Tablespace Definition	Template	This document describes the rational for the physical database design by defining the Tablespace of this database and should give context to the database so technical staff can understand the database design. Use this template to document Tables. Additional information to document: Physical Storage Strategy, Data Partitioning Strategy, Freespace Strategy, and Locking Strategy.	Design	Design Database

Conversion Approach	Template	The Conversion Process outlines the approach to executing both the data conversion and the system rollout. A summary of the functionality to be delivered, the strategies and timelines for delivering that functionality, and the impacts to the organization will outline the rollout segment. Data conversion will be covered by identifying what data needs to be converted, along with outlining the procedures that will be followed in converting that data and the controls that will be in place to ensure the quality and continuity of the data conversion. Finally, any risks and/or assumptions that may impact the conversion approach will be identified along with mitigation strategies and contingency plans for each.	Design	Design Database
Conversion Mapping	Template	This deliverable will identify which source system fields(s) will be used to populate target system field(s). Any logic used to translate or reformat source system information into target system information will also be included.	Design	Design Database
Overall Testing Approach (shaded for update)	Template	See first occurrence of Navigator Item on Design Technology Infrastructure design matrix.	See first occurrence of Navigator Item on Design Technology Infrastructure design matrix.	See first occurrence of Navigator Item on Design Technology Infrastructure design matrix.
Execution/ Operations Architecture Detailed Design	Template	The Execution/Operations Architecture Detailed Design is used to document the detailed design specifications for the execution architecture components.	Build and Test	Build and Test Execution/ Operations Architecture
Execution/ Operations Architecture Guide	Template	The Execution/Operations Architecture Guide is a spreadsheet that tracks the inventory of Execution Architecture components.	Build and Test	Build and Test Execution/ Operations Architecture

API Documentation	Template	Typically API documentation comes from the vendor. If API's are developed internally proper coding standards should be followed.	Build and Test	Build and Test Execution/ Operations Architecture
Execution/Operations Architecture Test Plan (shaded for update)	Template	See first occurrence of Navigator Item in Design Technology Infrastructure design matrix.	See first occurrence of Navigator Item in Design Technology Infrastructure design matrix.	See first occurrence of Navigator Item in Design Technology Infrastructure design matrix.
Execution/Operations Architecture Test Conditions (shaded for update)	Template	See first occurrence of Navigator Item in Design Technology Infrastructure design matrix.	See first occurrence of Navigator Item in Design Technology Infrastructure design matrix.	See first occurrence of Navigator Item in Design Technology Infrastructure design matrix.
Execution/Operations Architecture Test Scripts (shaded for update)	Template	See first occurrence of Navigator Item in Design Technology Infrastructure design matrix.	See first occurrence of Navigator Item in Design Technology Infrastructure design matrix.	See first occurrence of Navigator Item in Design Technology Infrastructure design matrix.
Execution/Operations Architecture Test Results (shaded for update)	Template	See first occurrence of Navigator Item in Design Technology Infrastructure design matrix.	See first occurrence of Navigator Item in Design Technology Infrastructure design matrix.	See first occurrence of Navigator Item in Design Technology Infrastructure design matrix.

Execution/Operations Architecture Test Data (shaded for update)	Template	See first occurrence of Navigator Item in Design Technology Infrastructure design matrix.	See first occurrence of Navigator Item in Design Technology Infrastructure design matrix.	See first occurrence of Navigator Item in Design Technology Infrastructure design matrix.
Development Architecture Detailed Design	Template	The Development Architecture Detail Design is used to document the detailed design specifications for the development architecture components.	Build and Test	Build and Test Development Architecture
Development Architecture Guide	Template	The Development Architecture Guide is a spreadsheet, which tracks the inventory of Development Architecture components.	Build and Test	Build and Test Development Architecture
Development Architecture Test Plan (shaded for update)	Template	See first occurrence of Navigator Item in Design Technology Infrastructure design matrix.	See first occurrence of Navigator Item in Design Technology Infrastructure design matrix.	See first occurrence of Navigator Item in Design Technology Infrastructure design matrix.
Development Architecture Test Conditions (shaded for update)	Template	See first occurrence of Navigator Item in Design Technology Infrastructure design matrix.	See first occurrence of Navigator Item in Design Technology Infrastructure design matrix.	See first occurrence of Navigator Item in Design Technology Infrastructure design matrix.
Development Architecture Test Scripts (shaded for update)	Template	See first occurrence of Navigator Item in Design Technology Infrastructure design matrix.	See first occurrence of Navigator Item in Design Technology Infrastructure design matrix.	See first occurrence of Navigator Item in Design Technology Infrastructure design matrix.

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Development Architecture Test Results (shaded for update)	Template	See first occurrence of Navigator Item in Design Technology Infrastructure design matrix.	See first occurrence of Navigator Item in Design Technology Infrastructure design matrix.	See first occurrence of Navigator Item in Design Technology Infrastructure design matrix.
Development Architecture Test Data (shaded for update)	Template	See first occurrence of Navigator Item in Design Technology Infrastructure design matrix.	See first occurrence of Navigator Item in Design Technology Infrastructure design matrix.	See first occurrence of Navigator Item in Design Technology Infrastructure design matrix.
Deployment Approach	Template	This document describes how the major activities of deployment will be performed. Such activities include: data conversion, policy and procedures deployment, workforce transition, risk management and activation of the business capabilities.	Build & Test	Deployment Planning
Operations Manual	Template	This documents the guiding principles of the operational environment. Typically this document would describe responsibilities, batch and online processing, system availability and security.	Build & Test	Deployment Planning
Disaster Recovery Plan	Template	This deliverable serves as a reference document in the event of a disaster. It is intended to reduce confusion and provide assistance in recovering the business functions as quickly as possible.	Build & Test	Deployment Planning

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Deployment Test Plan	Template	The Deployment Test Plan documents the specific steps in the deployment test process. It includes descriptions of the test processes or passes, the cycle definitions and entry and exit criteria.	Deployment	Activate and Verify Deployment
			Build & Test	Deployment Planning
Deployment Test Conditions	Template	The Deployment Test Conditions describe the conditions by which the component will be tested. The conditions map directly to the requirements.	Deployment	Activate and Verify Deployment
			Build & Test	Deployment Planning
Deployment Test Scripts	Template	The Deployment Test Scripts define the steps to be followed by the testing executor to test the conditions that have been identified. The scripts are instructions that are clear, unambiguous and repeatable in manner.	Deployment	Activate and Verify Deployment
			Build & Test	Deployment Planning
Deployment Test Results	Template	The Deployment Test Results describe the actual results of the test and any issues or lessons learned from the test effort.	Deployment	Activate and Verify Deployment
			Build & Test	Deployment Planning
Deployment Test Data	Template	The Deployment Test Data is the data used as input to test the conditions. The data is used in conjunction with the test scripts to validate that the conditions are being met accurately and as required.	Deployment	Activate and Verify Deployment
			Build & Test	Deployment Planning

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Online Detailed Design	Template	The Online Detail Design provides an overview of the components necessary for online development. It contains information that a programmer would need to successfully do his/her job. This will include standard naming conventions; the names of libraries or directories where files or test data may be found; a team contact list or a technical support contact list. Diagram flows, process flows and any general design changes will be included. A document describing expected results and space to provide actual results will be included, along with a time line indicating when the work is to be completed will be included.	Build & Test	Perform Application Detailed Design
Report Detailed Design	Template	The Report Detail Design provides an overview of the components necessary for creating reports. There exist notes for the programmer, including general design changes. There are process flows that describe how the reports are created, such as, where the information comes from that populates the reports, the format of the report and the program(s) used to create the reports. Information describing how often the reports are produced (daily, weekly, monthly, etc.) may be included also.	Build & Test	Perform Application Detailed Design
Interface Agreement (shaded for update)	Template	See first occurrence of navigator item on the Design Application stage.	See first occurrence of navigator item on the Design Application stage.	See first occurrence of navigator item on the Design Application stage.

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Interface Detailed Design	Template	The Interface Detail Design provides an overview of the Interface components and their functionality. There exists a process flow that visually shows each component and how the components fit together. There is a written description of each component, its functionality, how it receives information, processes it, and passes it on. Also included are programmer's notes; the names of stored procedures that may be used; and any issues that need to be known.	Build & Test	Perform Application Detailed Design
Component Test Plan	Template	The Component Test Plan documents the specific steps in the testing process. It includes descriptions of the test processes or passes, the cycle definitions, the phase containment criteria, the use of the testing database and configuration management for version control.	Build & Test	Build & Test Application
			Build & Test	Perform Application Detailed Design
Component Test Conditions	Template	The Component Test Conditions describe the conditions by which the component will be tested. The conditions map directly to the requirements.	Build & Test	Build & Test Application
			Build & Test	Perform Application Detailed Design
Component Test Scripts	Template	The Component Test Scripts define the steps to be followed by the testing executor to test the conditions that have been identified. The scripts are instructions that are clear, unambiguous and repeatable in manner.	Build & Test	Build & Test Application
			Build & Test	Perform Application Detailed Design

			Build & Test	Build & Test Application
Component Test Results	Template	The Component Test Results describe the actual results of the test and any issues or lessons learned from the test effort.	Build & Test	Perform Application Detailed Design
Component Test Data	Template	The Component Test Data is the data used as input to test the conditions. The data is used in conjunction with the test scripts to validate that the conditions are being met accurately and as required.	Build & Test / Build & Test	Build & Test Application / Perform Application Detailed Design
Stored Procedures	Template	Documents the SQL that is utilized to access one or more databases from multiple locations	Build & Test	Build and Test Application
Shells	Template	Shells are the coding templates used for stored procedures or functions so that all code is in a standardized format.	Build & Test	Build and Test Application
Source Code	Template	Source Code is developed for the project based on the projects standards and coding shells. It is a piece of software that meets all design and requirements and is completely tested and documented.	Build & Test	Build and Test Application
Component Test Plan (shaded for update)	Template	See first occurrence of Navigator Item.	See first occurrence of Navigator Item.	See first occurrence of Navigator Item.
Component Test Conditions (shaded for update)	Template	See first occurrence of Navigator Item.	See first occurrence of Navigator Item.	See first occurrence of Navigator Item.

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Component Test Scripts (shaded for update)	Template	See first occurrence of Navigator Item.	See first occurrence of Navigator Item.	See first occurrence of Navigator Item.
Component Test Results (shaded for update)	Template	See first occurrence of Navigator Item.	See first occurrence of Navigator Item.	See first occurrence of Navigator Item.
Component Test Data (shaded for update)	Template	See first occurrence of Navigator Item.	See first occurrence of Navigator Item.	See first occurrence of Navigator Item.
Assembly Test Plan (shaded for update)	Template	See first occurrence of Navigator Item in Design Application design matrix.	See first occurrence of Navigator Item in Design Application design matrix.	See first occurrence of Navigator Item in Design Application design matrix.
Assembly Test Conditions (shaded for update)	Template	See first occurrence of Navigator Item in Design Application design matrix.	See first occurrence of Navigator Item in Design Application design matrix.	See first occurrence of Navigator Item in Design Application design matrix.
Assembly Test Scripts(shaded for update)	Template	See first occurrence of Navigator Item in Design Application design matrix.	See first occurrence of Navigator Item in Design Application design matrix.	See first occurrence of Navigator Item in Design Application design matrix.

Assembly Test Results (shaded for update)	Template	See first occurrence of Navigator Item in Design Application design matrix.	See first occurrence of Navigator Item in Design Application design matrix.	See first occurrence of Navigator Item in Design Application design matrix.
Assembly Test Data (shaded for update)	Template	See first occurrence of Navigator Item in Design Application design matrix.	See first occurrence of Navigator Item in Design Application design matrix.	See first occurrence of Navigator Item in Design Application design matrix.
SIRs/CRs	Tool/ Template	See first occurrence of Navigator Item in Project Management design matrix.	See first occurrence of Navigator Item in Project Management design matrix.	See first occurrence of Navigator Item in Project Management design matrix.
Business Policies & Procedures	Template	This document consists of rules governing work within the organizations (policies) and the workflow for executing these rules (procedures). Business policies and procedures often drive creation of user procedures, or step-by-step instructions for users to integrate business rules and application steps, documented in job aids and/or online quick reference (OLQR) tools.	Build & Test	Develop Policies and Procedures

Product Test Plan	Template	The Product Test Plan documents the specific steps in the testing process. It includes descriptions of the test processes or passes, the cycle definitions, the phase containment criteria, the use of the testing database and configuration management for version control.	Build & Test	Prepare & Execute Application Product Test
Product Test Conditions	Template	The Product Test Conditions describe the conditions by which the component will be tested. The conditions map directly to the application and interface requirements.	Build & Test	Prepare & Execute Application Product Test
Product Test Scripts	Template	The Product Test Scripts define the steps to be followed by the testing executor to test the conditions that have been identified. The scripts are instructions that are clear, unambiguous and repeatable in manner.	Build & Test	Prepare & Execute Application Product Test
Product Test Results	Template	The Product Test Results describe the actual results of the test and any issues or lessons learned from the test effort.	Build & Test	Prepare & Execute Application Product Test
Product Test Data	Template	The Product Test Data is the data used as input to test the conditions. The data is used in conjunction with the test scripts to validate that the conditions are being met accurately and as required.	Build & Test	Prepare & Execute Application Product Test

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SIRs/CRs	Template	See first occurrence of navigator item in Project Management stage design matrix.	See first occurrence of navigator item in Project Management stage design matrix.	See first occurrence of navigator item in Project Management stage design matrix.
User Acceptance Test Plan	Template	The User Acceptance Test Plan documents the specific steps in the testing process. It includes descriptions of the test processes or passes, the cycle definitions, the phase containment criteria, the use of the testing database and configuration management for version control.	Build & Test	Prepare & Execute User Acceptance Test
User Acceptance Test Conditions	Template	The User Acceptance Test Conditions describe the conditions by which the component will be tested. The conditions map directly to the user requirements.	Build & Test	Prepare & Execute User Acceptance Test
User Acceptance Test Scripts	Template	The User Acceptance Test Scripts define the steps to be followed by the testing executor to test the conditions that have been identified. The scripts are instructions that are clear, unambiguous and repeatable in manner.	Build & Test	Prepare & Execute User Acceptance Test
User Acceptance Test Results	Template	The User Acceptance Test Results describe the actual results of the test and any issues or lessons learned from the test effort.	Build & Test	Prepare & Execute User Acceptance Test
User Acceptance Test Data	Template	The User Acceptance Test Data is the data used as input to test the conditions. The data is used in conjunction with the test scripts to validate that the conditions are being met accurately and as required.	Build & Test	Prepare & Execute User Acceptance Test

SIRs/CRs	Template	See first occurrence of navigator item in Project Management stage design matrix.	See first occurrence of navigator item in Project Management stage design matrix.	See first occurrence of navigator item in Project Management stage design matrix.
Deployment Test Plan (shaded for update)	Template	See first occurrence of navigator item on the Build & Test App design matrix.	See first occurrence of navigator item on the Build & Test App design matrix.	See first occurrence of navigator item on the Build & Test App design matrix.
Deployment Test Conditions (shaded for update)	Template	See first occurrence of navigator item on the Build & Test App design matrix.	See first occurrence of navigator item on the Build & Test App design matrix.	See first occurrence of navigator item on the Build & Test App design matrix.
Deployment Test Scripts (shaded for update)	Template	See first occurrence of navigator item on the Build & Test App design matrix.	See first occurrence of navigator item on the Build & Test App design matrix.	See first occurrence of navigator item on the Build & Test App design matrix.
Deployment Test Results (shaded for update)	Template	See first occurrence of navigator item on the Build & Test App design matrix.	See first occurrence of navigator item on the Build & Test App design matrix.	See first occurrence of navigator item on the Build & Test App design matrix.
Deployment Test Data (shaded for update)	Template	See first occurrence of navigator item on the Build & Test App design matrix.	See first occurrence of navigator item on the Build & Test App design matrix.	See first occurrence of navigator item on the Build & Test App design matrix.

SIRs/CRs	Template	See first occurrence of navigator item in Project Management stage design matrix.	See first occurrence of navigator item in Project Management stage design matrix.	See first occurrence of navigator item in Project Management stage design matrix.
Sign-off Sheet	Template	The Sign-off document contains the signatures of the project manager and project sponsor (client), indicating whether or not the given deliverable has been accepted.	Commit	Sign-off
Subcontractor Selection Criteria	Template	The Subcontractor Selection Criteria documents the criteria used to evaluate subcontractors. This deliverable should be used to summarize and compare the subcontractors' ability to satisfy the selection criteria. The use of this document will ensure the subselection process is an orderly, well-defined process, that leads to a "best-fit" and best value" subcontractor solution to meet the project's needs.	Supplier Agreement Management	Plan Subcontractor Management
			Supplier Agreement Management	Organize Subcontractor Management Resources
Subcontractor Management Plan	Template	The Subcontractor Management Plan captures all activities relating to the project's management of subcontractors. The plan serves as a guideline to assist project management in defining, measuring, and monitoring commitment to quality by all subcontractors assigned to the project. This plan is not intended for subcontractors who will work directly on the project team. Subcontractors that function as part of the project team should be addressed in the project plan.	Supplier Agreement Management	Plan Subcontractor Management
			Supplier Agreement Management	Organize Subcontractor Management Resources

Statement of Work	Reference Document	The project should use this space to store the agreed upon statement of work.	Supplier Agreement Management	Plan Subcontractor Management
Work Plan (shaded for update)	Template	See first occurrence of navigator item on Project Management stage design matrix.	See first occurrence of navigator item on Project Management stage design matrix.	See first occurrence of navigator item on Project Management stage design matrix.
Subcontractor Selection Criteria (shaded for update)	Template	See first occurrence of navigator item.	See first occurrence of navigator item.	See first occurrence of navigator item.
Subcontractor Management Plan (shaded for update)	Template	See first occurrence of navigator item.	See first occurrence of navigator item.	See first occurrence of navigator item.
Subcontractor Status Report	Template	The Subcontractor Status Report is to be completed by the subcontracting organization. It presents the status of a subcontractor's activities to project management at a high level. It summarizes status of the task order and provides more detailed information for incidents, scope impacts and deliverable schedules only when project management attention is needed. The Subcontractor Status Report template should be customized by the project based on the contract with the subcontractor to capture the desired information. The status report cannot require the subcontractor to provide status reporting beyond what is detailed in the task order.	Supplier Agreement Management	Control Subcontractor Management

Closing Memo (shaded for update)	Template	See first occurrence of navigator item on Project Management stage design matrix.	See first occurrence of navigator item on Project Management stage design matrix.	See first occurrence of navigator item on Project Management stage design matrix.
Product Selection Approach	Template	The Product Selection Approach provides an approach that the project will follow to select the best fit product (i.e. software, hardware) for the project. The approach will cover the following key tasks: (1) identify and list viable products from the marketplace, (2) narrow the list to a handful of finalists based on screening criteria, and (3) select the best solution for the client through comprehensive questionnaires and business scenarios.	Supplier Agreement Management	Plan Product Acquisition
Product Selection Criteria	Template	The Product Selection Criteria deliverable is used throughout the Product Selection process. Initially, the Product Selection Criteria should be used to list the key requirements that any candidate product must meet to become a final candidate, such as the desired high-level functional, technical, vendor, and quality criteria for products. These criteria will be input to the RFI, RFP and vendors will be screened against these criteria and against each other. Once the long list of vendors and products have been screened and reduced to a short list, the criteria will be refined to define the selection criteria upon which the final product will be selected.	Supplier Agreement Management	Plan Product Acquisition
			Supplier Agreement Management	Organize Product Acquisition Tasks
Product Selection Criteria (shaded for update)	Template	See first occurrence of navigator item.	See first occurrence of navigator item.	See first occurrence of navigator item.

Vendor Response to Business Scenarios	Template	The Vendor Response to Business Scenarios document identifies the overall internal and external operations and business scenarios of the project. This document should be used to describe the key scenarios in which the product will have to perform. The document will be used to perform assessment of the product "finalist" against the scenarios.	Project Management	Organize Product Acquisition Tasks
Product Acceptance Test Plan	Template	The Product Acceptance Test Plan documents the specific used by the project to test the product prior to final acceptance from the vendor.	Supplier Agreement Management	Control Product Acquisition
Product Acceptance Test Conditions	Template	The Product Acceptance Test Conditions describe the conditions by which the product will be tested. The conditions map directly to the product selection criteria.	Supplier Agreement Management	Control Product Acquisition
Product Acceptance Test Scripts	Template	The Product Acceptance Test Scripts define the steps to be followed by the testing executor to test the conditions that have been identified. The scripts are instructions that are clear, unambiguous and repeatable in manner.	Supplier Agreement Management	Control Product Acquisition
Product Acceptance Test Results	Template	The Product Acceptance Test Results describe the actual results of the test and any issues or lessons learned from the test effort.	Supplier Agreement Management	Control Product Acquisition
Product Acceptance Test Data	Template	The Product Acceptance Test Data is the data used as input to test the conditions. The data is used in conjunction with the test scripts to validate that the conditions are being met accurately and as required.	Supplier Agreement Management	Control Product Acquisition
Product Performance Test Plan	Template	The Product Performance Test Plan documents the specific steps used by the project to ensure the performance of the product meets the specified requirements.	Supplier Agreement Management	Control Product Acquisition
Product Performance Test Conditions	Template	The Product Performance Test Conditions describe the conditions by which the component will be tested. The conditions map directly to the product selection criteria.	Supplier Agreement Management	Control Product Acquisition
Product Performance Test Scripts	Template	The Product Performance Test Scripts define the steps to be followed by the testing executor to test the conditions that have been identified. The scripts are instructions that are clear, unambiguous and repeatable in manner.	Supplier Agreement Management	Control Product Acquisition
Product Performance Test Results	Template	The Product Performance Test Results describe the actual results of the test and any issues or lessons learned from the test effort.	Supplier Agreement Management	Control Product Acquisition

Product Performance Test Data	Template	The Product Performance Test Data is the data used as input to test the conditions. The data is used in conjunction with the test scripts to validate that the conditions are being met accurately and as required.	Supplier Agreement Management	Control Product Acquisition
Closing Memo (shaded for update)	Template	See first occurrence of navigator item on Project Management stage design matrix.	See first occurrence of navigator item on Project Management stage design matrix.	See first occurrence of navigator item on Project Management stage design matrix.
SIRs/CRs	Tool	See first occurrence of Navigator Item in Project Management design matrix.	See first occurrence of Navigator Item in Project Management design matrix.	See first occurrence of Navigator Item in Project Management design matrix.
Tracking Tool Installation Guide	Reference Document	The Tracking Tool Installation Guide outlines the steps to take when installing any of the various tracking tools including the Issues, Risk, and SIRs/CRs tools.	Process	Organize SEPG Project Resources
SEPG Project Processes & Policies	Template	The SEPG Project Processes & Policies document is used to record standards and procedures that are specific to a project. Such documents would include the Issue Tracking Process, Risk Tracking Process, New Process Definition Process, all development and testing procedures, etc. See attached samples as a starting point for developing project-specific processes.	Process	Organize SEPG Project Resources
CMM Awareness Training	Training	The CMM Awareness Training is a presentation designed to help training attendees understand the CMM framework and its benefits, understand CMM Level 2 concepts and examples, and understand CMM Level 3 concepts and examples. This Training pertains to the Capability Maturity Model (CMM) for Software only, not to CMM-Integrated (CMMI) framework. This training does not cover aspects of CMMI that are not common with the CMM for Software. CMM in a Box is based on the CMMI framework.	Process	Organize SEPG Project Resources

CMM to CMMI Transition Training	Training	The CMM to CMMI Transition Training is a presentation that focuses on the transition from the Capability Maturity Model (CMM) for Software to CMM – Integrated (CMMI). The training provides generic examples of the difference between the models and what new processes have been added to CMMI. CMM in a Box is based on the CMMI framework. It is designed to help the training attendees understand the transition from Capability Maturity Model (CMM) to Capability Maturity Model – Integrated (CMMI) and how the new CMMI requirements are being implemented within the organization.	Process	Organize SEPG Project Resources
CMMI for Sponsors Training	Training	The CMMI Awareness for Sponsors Training is a presentation designed to help sponsors understand the CMMI framework and its benefits, understand CMMI Level 2 concepts and examples, and understand CMMI Level 3 concepts and examples.	Process	Organize SEPG Project Resources
Tracking Tool Design Document	Reference Document	This purpose of the Tracking Tool Design document is to provide design information for projects who wish to customize the tracking tools. The primary audience would be the Access developers doing the modifications. This document provides design information for the forms, events, macros, queries and reports for the Issue Tracking Tool and System Investigation Request (SIR) & Change Request (CR) Tracking Tool.	Process	Organize SEPG Project Resources
Service Level Agreement Reference	Reference Document	This document is included on the page for reference purposes only. The projects are responsible for completing these documents. Do not download or save from this page, go to the Project Management Stage if you need a copy of this document. The purpose of this Service Level Agreement is to define the service level and communication requirements between a project and the Software Engineering Process Group (SEPG). This document is presented to the project manager who must agree to and sign before a substantive SEPG support commences. The SEPG will distribute a copy of the Service Level Agreement to the Engagement Partner, while it is the responsibility of the Project Manager to distribute/educate project team members on the contents. The Service Level Agreement provides an overview of estimated time commitments to support execution of SEPG efforts.	Process	Rollout & Support Projects

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Tailoring & Waiver Request Reference	Reference Document	This document is included on the page for reference purposes only. The projects are responsible for completing these documents. Do not download or save from this page, go to the Project Management Stage if you need a copy of this document. The Tailoring & Waiver Request template provides guidance on how a project can tailor the methodology to better suit their needs. It includes guidelines on policy, process, deliverable, and tool tailoring. After reviewing the guidelines, if your project determines that a waiver request form is required, please complete the waiver request form using the "Compose Deliverable" option above.	Process	Rollout & Support Projects
Metrics Workbook Reference	Reference Document	This document is included on the page for reference purposes only. The projects are responsible for completing these documents. Do not download or save from this page, go to the Project Management Stage if you need a copy of this document. The Project Metrics Workbook template is used as a central repository for the metrics required by the Project Team. The project must complete the Metrics Workbook on a monthly basis and submit it to the SEPG team lead. The Metrics Plan outlines the overall metrics program and provides detailed explanations for each metric included in the Metrics Workbook.	Process	Rollout & Support Projects
Metrics Plan Reference	Reference Document	This document is included on the page for reference purposes only. The projects are responsible for completing these documents. Do not download or save from this page, go to the Project Management Stage if you need a copy of this document. The Metrics Plan describes the overall approach for identifying, collecting, and analyzing delivery metrics. Projects must use this document to plan for their metrics.	Process	Rollout & Support Projects
Closing Memo Reference	Reference Document	This document is included on the page for reference purposes only. The projects are responsible for completing these documents. Do not download or save from this page, go to the Project Management Stage if you need a copy of this document. This memo is used to communicate and summarize the project. This memo should include project results, pertinent project metrics including schedule and budget plan versus actual, project successes, and project shortcomings.	Process	Rollout & Support Projects

SQA Debrief Reference	Reference Document	This document is included on the page for reference purposes only. The projects are responsible for completing these documents. Do not download or save from this page, go to the Project Management Stage if you need a copy of this document. The Software Quality Assurance (SQA) Debrief is conducted at the end of the project. During this meeting, the Software Engineering Process Group (SEPG) project manager gathers metrics on the effectiveness of the SQA process for the project and discusses "lessons learned" with project management executives. The results of the SQA Debrief are used to continuously improve the SQA process, methodology and tools.	Process	Rollout & Support Projects
Participant Information	Sample	The purpose of the Participant Information Sheet is to set expectations of the assessment participants as they prepare for the assessment process.	Process	Conduct Assessment
Sample Organization Structures	Sample	This sample document outlines the different Organizational Structure Types and provides samples of each. These include Functional, Process, Product, Matrix, and Customer/Industry-focused.	Personnel	Verify and Validate Organization Structure
			Personnel	Design Organization Infrastructure
Balanced Scorecard	Template	The Balanced Scorecard should be used to integrate financial and operational measures within the organization as a means to focus management on strategy and vision. The Balanced Scorecard documents a set of measures that give top managers a fast but comprehensive view of the business. The Balanced Scorecard has five key elements: Perspectives, Objectives, Metrics, Targets, and Actuals.	Personnel	Design Performance Management Infrastructure

Project Management Review Tool	Reference Document	The purpose of the Project Management Review Tool is to provide information on how to demonstrate each best practice by KPA (Key Process Area). It includes references to templates, job aids and samples deliverables.	Project Management	Plan Project Execution
Orientation Binder	Template	See first occurrence of Navigator Item in the Organizational Management Plan & Organize SEPG design Matrix	See first occurrence of Navigator Item in the organizational Management Plan & Organize SEPG design Matrix	See first occurrence of Navigator Item in the Organizational Management Plan & Organize SEPG design Matrix
SQA Debrief	Template	The Software Quality Assurance (SQA) Debrief is conducted at the end of the project. During this meeting, the Software Engineering Process Group (SEPG) project manager gathers metrics on the effectiveness of the SQA process for the project and discusses "lessons learned" with project management executives. The results of the SQA Debrief are used to continuously improve the SQA process, methodology and tools.	Project Management	Complete Project
Peer Review	Template	Moved to Peer Review design matrix.	Moved to Peer Review design matrix.	Moved to Peer Review design matrix.
Plan Delivery	Task Package	Moved to Commit design matrix.	Moved to Commit design matrix.	Moved to Commit design matrix.
Commit	Template	Moved to Commit design matrix.	Moved to Commit design matrix.	Moved to Commit design matrix.

Database Configuration	None	The Database Configuration defines the details of the actual database installation configuration including sizes and locations for databases. This information can be obtained from the database design tool.	Design	Design Database
Conversion Process	Template	The Conversion Process document outlines the approach to executing both the data conversion and the system rollout. A summary of the functionality to be delivered, the strategies and timelines for delivering that functionality, and the impacts to the organization will outline the rollout segment. Data conversion will be covered by identifying what data needs to be converted, along with outlining the procedures that will be followed in converting that data and the controls that will be in place to ensure the quality and continuity of the data conversion. Finally, any risks and/or assumptions that may impact the conversion approach will be identified along with mitigation strategies and contingency plans for each.	Design	Design Database